

NVQs in Customer Service Levels 1–4
Sept 2011 – August 2012
Midlands-Anglia, North, NI

September 2012

1. The qualifications and standards

• **Structure and content**

Assessment Team:	Findings:
	<p>Overall assessment practice has been good and included a wide range of assessment methods. Centres like the standards and are selecting units which reflect the role of the candidate.</p> <p>External Verifiers have provided guidance to centres with respect to the following:</p> <ul style="list-style-type: none"> • detail required in observations and the authentication of personal statements • clearer audit trail for the recording of professional discussions. Ensure that they can be accessed as smaller sized discussions and clearly identifiable as to their content • clear referencing of evidence requirements within e-portfolio systems • making it clear how the evidence supports the candidate's competence and how it reflects their work role <p>Overall, there are sufficient occupationally competent and qualified assessors and internal quality assurance personnel for the number of candidates on programme. Trainee assessors and IQAs have clear action plans for achievement of relevant assessment and IQA qualifications with a nominated counter-signatory in place. Centres are reminded that the counter-signatory is there to ensure that the assessment judgements/IQA decisions are valid as well as supporting the trainee assessor/IQA. It is not just a paper exercise.</p>

	<p>Centres are required to provide External Verifiers with updated CPD records. It is important that CPD clearly reflects occupational competence for the standards the team members are assessing or Internally Quality Assuring. There are still centres that are providing very generic CPDs (to meet multiple qualifications). Whilst it is accepted that CPD activities can reflect the requirements of more than one qualification, it is important that the assessment personnel reflect on how this will help them support their candidates for each of the qualifications. Centres are reminded that it is a requirement for an OCR EV to endorse copies of the assessor and IQA qualifications held by the team.</p> <p>External Verifiers have provided centres with the following advice:</p> <ul style="list-style-type: none"> • provide clear audit trails for CPD along with authenticated copies of original assessor/IQA certificates • include development activities to aid the understanding of the QCF terminology eg the difference between identify, describe and explain • Use units from the Customer Service qualification to support CPD activities for the team
Resources:	<p>Findings:</p> <p>Overall centres are well resourced in relation to staffing and equipment available to candidates. Resources are regularly evaluated and renewed/updated as and when appropriate.</p> <p>Centres have ensured they can confirm that all equipment and accommodation used for assessment purposes comply with current health and safety legislation. Where the External Verifier has found this to be a weakness, recommendations have been identified on the report. Many of the centres have to ensure that strict adherence to health and safety is maintained due to the regulations imposed by the funding organisations. Centres are reminded that the same evidence can be presented to the External Verifier.</p> <p>There has been an increase in the number of centres using e-portfolios and digital recording equipment for the recording of discussions and question and answer sessions.</p>

Candidate Support:	<p>Findings:</p> <p>Nearly all centres visited by the External Verifiers provide their candidates with a comprehensive induction programme. Candidates interviewed by the External Verifiers confirmed that they had participated in an induction programme, were aware of the support available to them and understood the Appeals Procedure.</p> <p>Feedback from the External Verifier reports confirms that overall, a good range of valid assessment methods is being used eg observations, expert witness testimonies, discussions and personal statements. Some centres are now using audio/digital equipment to record discussions and witness testimonies. External Verifiers have made recommendations for the increased use of witness testimonies when direct observations are not available and/or difficult to achieve.</p> <p>There is evidence within centres that regular assessment planning takes place with candidates provided with consistent opportunities to review progress. Many centres are providing assessment opportunities facilitating unit accreditation if required.</p> <p>There have been some occasions where the External Verifiers have made recommendations with respect to the supporting of candidates when it has become necessary to change assessor. This can be quite confusing and frustrating for the candidate, so it is important that they are appropriately supported during the transition.</p>
Assessment and Verification:	<p>Findings:</p> <p>The majority of centres' IQA strategies meet OCR requirements. There were some very good examples seen by the External Verifiers during the visits. This included very detailed IQA sampling strategies, clear audit trails of assessment and verification, assessment planning and review of progress. Recommendations have been made by External Verifiers to some centres with respect to the review of IQA practice and standardisation activities to support the implementation of the new standards.</p> <p>There are some centres, who have received action points and therefore sanctions from the External Verification visits due to a lack of documented evidence confirming formative internal verification, planning of internal verification activities, interview of candidates and assessor observations. Within some centres, the minutes of meetings do not always reflect true standardisation activities such as the standardisation of assessor interpretation of the qualification requirements. The meetings tend to be general team meetings that review all programmes offered by the centre. Where this has been identified, centres are provided with guidance from the External Verifier.</p>

	<p>Some centres have been reminded to review their IQA sampling strategies to ensure that they meet the requirements of the QCF qualifications. Some External Verifiers reminded centres to include the interpretation of the QCF terminology within their standardisation activities eg the difference between identify, explain, describe and evaluate.</p> <p>External Verifiers have made recommendations encouraging centres to use a wider range of assessment methods ie increase use of witness testimonies if direct observation is difficult.</p> <p>There have still been issues with some e-portfolio systems and the lack of facilities to record the evidence requirements. It is the responsibility of the centre to ensure that any e-portfolio system used is fit for purpose and enables the assessment and IQA team(s) to provide a clear audit trail of assessment and IQA. Omissions from candidate evidence can result in high sanction levels being applied.</p>
Management Systems and Records:	<p>Findings:</p> <p>All centres visited by the External Verification team provided evidence of the centre's systems and policies for the delivery of NVQs.</p> <p>In the majority of centres, staff development was clearly in place with staff undertaking a wide range of CPD activities in order to retain occupational competence. Where there were weaknesses it was due to assessors/internal verifiers not recording specific activities relating to Customer Service. In some cases when the assessment personnel were interviewed it was confirmed that appropriate activities had been undertaken.</p> <p>Weaknesses in the management systems and records tended to attract a level 1 sanction. Where centres received a higher level sanction it was usually due to other areas where there were concerns.</p>

Assessment Summary:	Findings:
	<p>Overall assessment is well planned and candidates are provided with regular opportunities for assessment. Assessors regularly visit the candidates and evidence is based on real work activities using a good range of valid assessment methods. Candidates are provided with good opportunities to demonstrate competence through real work activities. The effective use of digital equipment has enabled assessment personnel to record discussions with candidates. This has enhanced the evidence and resulted in less reliance on personal statements and banks of knowledge questions.</p> <p>Digital equipment has also been used for witness testimonies which enable the assessors to obtain statements which are timely and supportive of holistic assessment.</p> <p>Internal quality assurance is carried out within centres and units sampled. Overall the internal quality assurance strategy has continued to improve within centres and External Verifiers are confirming that in the majority of centres, it is robust and provides a clear audit trail of assessment and internal verification.</p> <p>The main weaknesses are with respect to the internal verification sampling plan not identifying the observation of assessors and interview of candidates, and standardisation meetings not standardising assessor practice in relation to interpretation of the qualification standards.</p> <p>From the centre reports, it is clear that assessment personnel are now more comfortable with the concept of QCF qualifications and associated rules of combination.</p>

2. Sector Developments

Skills CfA opened consultation on the revised Customer Service National Occupational Standards (NOS) in August 2012. Centres were encouraged to participate in the survey in order to raise any positive and/or negative aspects with the standards.

The recession has clearly hit employers and training organisations alike and funding is not always available to source training. Funding opportunities vary between regions and can be very dependent on what apprenticeship programmes are available.

Customer Service qualifications still continue to be the major benchmark for organisations and how they promote their business.